TVB NEWS

Television Bureau of Advertising, Inc., 477 Madison Avenue, New York, New York 10022 (212) 486-1111

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FROM: GEORGE HOOVER

March 6, 1990

BROADCAST REVENUES UP 3.6% IN 1989 TO SET NEW RECORD;
AUTOS BECOME TOP CATEGORY FOR FIRST TIME

A strong 1989 fourth quarter - up 8.1% - led broadcast television to another record year with revenues up 3.6% over the previous year, according to the Television Bureau of Advertising.

Figures from Broadcast Advertisers Reports show that $21.3 billion was invested in over-the-air television advertising last year, compared to $20.6 billion in 1988.

The strong fourth quarter was achieved without heavy political advertising, which in 1988 accounted for $150.8 million.

Local television advertising increased 4.5% in 1989.

Spot television was up 2.3%.

Without the benefit of the summer and winter olympics and national elections, network television still managed to post a total of $9.6 billion, matching 1988.

National syndication advertising was $1.3 billion, up 42.9% over the previous year.

These 1989 figures represent BAR estimates of time sales only. The spot and local figures are estimates for the 75 monitored markets. By extrapolating these BAR estimates to the full universe of over 200 markets and adding production and talent costs, <u>total</u> advertiser investments in television were approximately $25.3 billion in 1989.

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AUTOS TOP CATEGORIES FOR FIRST TIME

For the first time, the automotive industry became the leader in expenditures among the top categories in network, spot and national syndication.

Autos, which trailed food and food products by $246 million in 1988, crept into first place in 1989 by $595,400. Auto advertising was up 14%, almost reaching $3 billion. A half million dollars behind, food and food products registered a 4% increase in 1989.

The five categories in national network spot and syndication (combined) were:

	1988	1989	
Automotive	$2,600,451,200	$2,969,741,100	+14%
Food & Food Products	2,846,178,800	2,969,145,700	+ 4%
Restaurants & Drive-Ins	1,343,830,900	1,485,770,700	+11%
Toiletries & Toilet Gds	1,270,272,800	1,287,243,000	+ 1%
Proprietary Medicines	1,067,216,800	1,057,750,500	- 1%

Not included in the above are retail stores related to the categories including supermarkets in food and food products, auto and truck dealers in automotive and drug stores in proprietary medicines. Local data is included in restaurants and drive-ins.

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Data for local, spot, network and national syndication, in addition to expenditures for advertisers and product classifications, according to BAR, follow:

TV ADVERTISING INVESTMENTS

4THQ 1989 VS 1988

	Oct - Dec '88	Oct - Dec '89	%CHG
Network	$ 2,646,122,200	$ 2,906,941,200	- 9.
Spot	1,547,942,300	1,596,449,000	+ 3.
Local	1,373,376,600	1,406,908,200	+ 2.
Nat. Syn	259,503,600	389,074,700	+49.
Total	$5,826,954,700	$6,299,373,100	+ 8.

1989 vs 1988

	Jan - Dec. '88	Jan - Dec '89	%CHG
Network	$ 9,580,367,400	$ 9,559,077,100	- 0.2
Spot	5,271,214,400	5,423,256,600	+ 2.3
Local	4,848,115,300	5,076,006,100	+ 4.5
Nat. Syn	900,331,400	1,286,826,100	+42.9
Total	$20,600,028,500	$21,345,165,900	+ 3.6

SOURCE: BAR

LOCAL/RETAIL * TELEVISION ADVERTISING EXPENDITURES BY PRODUCT CLASSIFICATION

	1988	1989	% CHANGE
AUTOMOTIVE	$ 530,571,100	$ 466,923,200	- 12
Auto Repair & Service Stations	92,513,800	88,743,300	
Auto Supply & Accessory Stores	37,666,200	39,734,700	
Auto & Truck Dealers	379,766,400	321,401,900	
Camper & Recreational Vehicle Dealers	7,909,900	7,947,300	
Mobile Home Dealers & Sites	8,408,400	4,443,900	
Motorcycle Dealers	1,080,900	1,373,200	
Automotive Misc.	3,225,500	3,278,900	
APPAREL STORES	177,188,300	198,708,500	+ 12
Clothing Stores	121,151,500	143,583,600	
Fur Salons	9,633,400	8,344,700	
Shoe Stores	43,723,800	44,006,600	
Apparel Stores Misc.	2,679,600	2,773,600	
BUSINESS & FINANCIAL SERVICES	295,572,100	298,996,100	+ 1
Banks, Savings & Loan Associations	191,402,300	197,298,900	
Computer Sales & Repair Services	5,432,500	3,799,800	
Employment Agencies	4,717,900	2,984,800	
Insurance Agencies	24,469,100	16,951,000	
Financial Planning Services	29,712,200	24,355,500	
Loan & Mortgage Companies	23,253,500	30,411,000	
Office Equipment & Supply Stores	5,014,800	6,143,000	
Business & Financial Miscellaneous	11,569,800	17,052,100	
DEPARTMENT, DISCOUNT & VARIETY STORES	306,964,400	372,976,400	+ 22
Department Stores	150,283,600	213,098,900	
Discount Department Stores	115,457,700	117,115,800	
Mail Order & Catalog Showrooms	11,228,500	11,123,000	
Shopping Centers & Associations	24,361,300	26,009,700	
Variety Stores	5,633,300	5,629,000	
DRUG & FOOD STORES	448,244,800	468,021,900	+ 4
Bake Shops	11,521,100	10,917,400	
Beverage Distributors	2,648,600	2,908,400	
Dairy Stores	10,903,100	11,721,600	
Drug Stores	77,583,000	93,916,500	
Food Stores & Supermarkets	339,045,100	341,197,300	
Meat, Fish & Poultry Stores	2,905,300	2,846,000	
Food Dealers Miscellaneous	3,638,600	4,514,700	
HOUSEHOLD SERVICES	95,342,300	101,253,800	+ 6
Builders & Home Improvement Contractors	26,471,800	27,172,100	
Exterminators	10,234,800	9,096,200	
Moving & Storage Companies	4,106,800	2,508,800	
Nurseries, Lawn Care Supplies & Service	5,132,700	7,706,900	
Plumbing, Heating, Air Conditioner Contractors	7,049,400	7,088,400	
Poo Contractors, Supplies & Service	7,825,300	7,842,400	
Realtors & Real Estate Developers	30,690,700	33,643,100	
Upholsterers	713,300	674,100	
Household Service Miscellaneous	3,117,500	5,521,800	

* As defined by Broadcast Advertisers Reports

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LOCAL CLASSIFICATIONS CONTINUED

	1988	1989	% CHANGE
HOUSEHOLD STORES	$ 548,442,000	$ 614,158,100	+ 12
Appliance Stores & Repair	138,909,700	152,788,800	
Carpet & Floor Covering Stores	51,803,800	51,038,800	
Drapery & Interior Decorating Services	1,179,700	1,353,400	
Fabric & Sewing Machine Stores	2,050,200	1,816,800	
Furniture Stores	237,920,800	278,184,800	
Home Centers & Hardware Stores	98,391,700	106,275,200	
Lighting & Light Fixture Stores	3,655,300	5,619,800	
Household Stores Miscellaneous	14,531,100	17,080,500	
LEISURE TIME STORES & SERVICES	1,385,570,800	1,469,706,500	+ 6
Amusement & Entertainment	127,779,200	143,942,100	
Hotels & Resorts U.S.	78,416,500	82,412,800	
Marine Suppliers & Services	5,174,200	4,058,700	
Movies	185,989,100	210,823,900	
Restaurants & Drive-Ins	803,967,600	838,256,800	
Sport, Hobby & Toy Stores	46,886,600	47,397,200	
Travel & Tour Agencies	8,044,800	8,315,400	
Leisure Time Activities & Services Misc.	129,312,800	134,499,600	
LOCAL MEDIA	197,865,400	223,262,000	+ 13
Magazines & Other Local Publications	2,078,500	1,752,500	
Newspapers	33,858,000	37,154,900	
Radio & Cable TV	160,351,100	182,803,700	
Local Media & Advertising Services Misc.	1,577,800	1,550,900	
MEDICAL & HEALTH RELATED SERVICES	276,419,600	319,749,700	+ 16
Convalescent & Retirement Homes	767,500	490,100	
Health Clubs & Reducing Salons	61,895,500	93,648,100	
Hearing Aid Centers	2,390,000	1,996,000	
Medical & Dental Services	130,277,400	144,771,500	
Optical Services & Supplies	80,095,800	77,392,700	
Medical & Health Supply Dealers Misc.	993,400	1,451,300	
PERSONAL SERVICES	141,468,500	170,591,000	+ 21
Beauty Shops & Supplies	24,993,400	25,682,400	
Data Match Supplies	3,462,000	5,195,300	
Legal Services	63,949,000	82,291,800	
Photographers & Photo Studios	255,200	400,900	
Personal Services Miscellaneous	48,808,900	57,020,600	
PUBLIC UTILITIES & FUEL DEALERS	51,851,400	56,342,800	+ 9
Fuel Supply Dealers	1,185,500	1,578,200	
Gas, Electric & Water Companies	45,854,300	50,429,500	
Transit & Transportation	4,811,600	4,335,100	

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LOCAL CLASSIFICATION CONTINUED

	1988	1989	% CHANGE
RETAIL & LOCAL STORES, OTHER	$ 68,807,800	$ 78,263,200	+ 14
Agriculture Stores & Services	4,953,400	4,844,200	
Florists	2,113,400	2,122,500	
Gift & Book Stores	9,341,600	9,515,400	
Jewelry Stores	22,713,400	25,745,300	
Luggage & Leather Shops	549,900	543,300	
Music Stores	9,276,300	8,675,700	
Pets & Pet Supply Stores	2,024,300	2,683,100	
Retail & Local Stores Miscellaneous	17,835,500	24,133,700	
RETAIL SERVICES MISCELLANEOUS	158,733,300	172,988,300	+ 9
Auctioneers & Auction Houses	1,005,000	620,100	
Aviation Sales & Services	409,400	279,000	
Dry Cleaners & Laundries	1,323,300	1,520,600	
Education Services	112,062,900	131,862,200	
Funeral Homes & Services	4,521,500	4,990,500	
Rental Services - Auto & Truck	3,321,200	2,671,300	
Rental Services - Other	36,090,000	31,044,600	
MISCELLANEOUS	165,073,500	64,064,600	- 61
Industrial Manufacturing	1,882,600	2,788,100	
Political Advertisements	146,452,800	49,488,900	
Miscellaneous	16,738,100	11,787,600	
TOTAL	$4,848,115,300	$5,076,006,100	

NOTE: Most co-op activity is credited by BAR to the manufacturers and is <u>not</u> included in the above local data.

SOURCE: Television Bureau of Advertising from Broadcast Advertisers Reports in the top 75 markets.

TOP 25 LOCAL/RETAIL TELEVISION ADVERTISERS** -- 1989

		1988	1989	% CHANGE
1	Pepsico, Inc. (Pizza Hut, Taco Bell, Kentucky Fried Chicken)	$ 155,319,000	$ 164,058,600	+ 6
2	McDonald's Corp.	128,102,300	142,686,400	+ 11
3	Walt Disney Co.*	58,147,900	63,525,400	+ 9
4	Grand Metropolitan*	121,416,900	62,961,400	- 48
5	Time Warner Inc.* (Movies & Cable TV)	34,564,800	48,030,200	+ 39
6	Kohlberg Kravis Roberts & Co.*(Safeway, Fred Meyers, Stop & Shop, etc.)	45,784,900	46,741,900	+ 2
7	Sears Roebuck & Co.*	14,989,900	46,502,300	+ 210
8	American Stores Co.	48,307,300	46,313,500	- 4
9	Dayton-Hudson Corp.	27,034,100	42,741,600	+ 58
10	Imasco Ltd.* (Hardees, People's)	43,489,900	42,406,800	- 2
11	Circuit City Stores, Inc.	30,942,400	41,072,000	+ 33
12	Wendy's International, Inc.	31,301,700	36,509,000	+ 17
13	Foodmaker, inc. (Jack-In-The-Box, Chi-Chi's)	28,858,100	35,332,400	+ 22
14	Walton Enterprises, Inc. (Wal-mart)	26,997,300	34,707,800	+ 29
15	The Kroger Co.	38,334,000	34,506,400	- 10
16	Sony Corp.* (Movies)	20,207,200	30,404,100	+ 50
17	Whitman Corp. (Midas Muffler)	25,716,600	30,035,300	+ 17
18	U.S. Shoe Corp. (Lens Crafter)	34,135,800	27,081,500	- 21
19	Jerrico, Inc. (Long John Silvers)	26,254,600	26,140,300	- 0 -
20	May Department Stores Co.	27,171,100	24,896,600	- 8
21	MCA Inc. (Movies)	16,123,600	24,670,000	+ 53
22	Collins Food Inter. Inc. (Sizzler)	22,794,900	24,171,800	+ 6
23	DWG Corp.* (Arby's)	17,461,400	23,692,200	+ 36
24	BFB Acquisition Corp. (Montgomery Ward)	4,850,700	23,416,700	+ 383
25	K-Mart Corp.*	29,949,300	23,332,700	- 22

* 1988 data adjusted to reflect mergers, acquisitions, divestitures in 1989.
** As defined by BAR.

SOURCE: Television Bureau of Advertising from Broadcast Advertisers Reports data in top 75 markets.

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NATIONAL AND REGIONAL SPOT TELEVISION ADVERTISING

By Daypart

	Oct-Dec. 1988	Oct-Dec. 1989	%CHANGE	%SHARE
Daytime	$ 338,725,500	$ 342,036,100	+ 1.0	21.4
Early Evening	473,824,700	507,376,900	+ 7.1	31.8
Nighttime	441,159,100	441,517,500	+ 0.1	27.7
Late Night	294,233,000	305,518,500	+ 3.8	19.1
Total	$1,547,942,300	$1,596,449,000	+ 3.1	100.0

	Jan-Dec 1988	Jan-Dec 1989	%CHANGE	%SHARE
Daytime	$1,087,824,400	$1,082,136,500	- 0.5	19.9
Early Evening	1,677,806,900	1,740,774,600	+ 3.8	32.1
Nighttime	1,503,323,500	1,538,913,400	+ 2.4	28.4
Late Night	1,002,259,600	1,061,432,100	+ 5.9	19.6
Total	$5,271,214,400	$5,423,256,600	+ 2.3	100.0

* Top 75 markets only.

SOURCE: Television Bureau of Advertising from Broadcast Advertisers Reports data.

ESTIMATED INVESTMENTS BY NATIONAL AND REGIONAL SPOT TELEVISION ADVERTISERS
BY PRODUCT CLASSIFICATION

	1988	1989	% CHANGE
Agriculture & Farming	$ 21,744,400	$ 17,357,700	- 20
Apparel, Footwear & Accessories	66,561,300	93,616,900	+ 41
Automotive	1,264,326,700	1,414,833,700	+ 12
Beer & Wine	255,182,400	208,122,300	- 18
Building Material, Equipment & Fixtures	73,177,500	79,352,000	+ 8
Computers, Office Equipment & Stationery	26,913,700	31,794,600	+ 18
Confectionery & Soft Drinks	325,005,100	302,674,800	- 7
Consumer Services	310,733,900	380,267,800	+ 22
Food & Food Products	966,576,800	958,455,800	- 1
Freight & Industrial Development	36,953,400	35,811,100	- 3
Gasoline, Lubricants & Other Fuels	123,865,800	163,955,500	+ 32
Home Electronics Equipment	113,275,600	116,469,200	+ 3
Horticulture	46,504,200	47,282,200	+ 2
Household Equipment & Supplies	123,858,000	132,078,400	+ 7
Household Furnishings	42,835,700	42,591,000	- 1
Insurance	94,292,700	103,882,000	+ 10
Jewelry, Optical Goods & Cameras	44,436,600	58,832,700	+ 32
Pet Foods & Supplies	42,631,700	41,044,300	- 4
Proprietary Medicines	183,944,200	166,599,200	- 9
Publishing & Media	153,533,200	130,351,500	- 15
Religious, Political & Unions	57,884,600	17,717,800	- 69
Smoking Materials	7,665,300	4,882,800	- 36
Soaps, Cleansers & Polishes	132,111,200	118,370,800	- 10
Sporting Goods & Toys	202,186,500	192,727,600	- 5
Toiletries & Toilet Goods	276,530,500	281,113,100	+ 2
Travel, Hotels & Resorts Outside U.S.	228,992,800	214,671,200	- 6
Miscellaneous	49,490,600	68,400,600	+ 38
TOTAL	$5,271,214,400	$5,423,256,600	+ 3

SOURCE: Television Bureau of Advertising from Broadcast Advertisers Reports data.

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TOP 25 NATIONAL AND REGIONAL SPOT TELEVISION ADVERTISERS - 1989

		1988	1989	% CHANGE
1	General Motors Corp.**	$ 312,150,400	$ 350,297,700	+ 12
2	The Procter & Gamble Co.*	218,812,400	220,226,600	+ 1
3	Ford Motor Co.**	165,666,600	179,531,600	+ 8
4	Philip Morris Companies, Inc.*	156,461,300	178,765,200	+ 14
5	Chrysler Corp.***	147,497,700	165,682,800	+ 12
6	Toyota Motor Sales Co., Ltd.**	133,434,500	164,199,800	+ 23
7	General Mills, Inc.	132,002,300	135,541,400	+ 3
8	Nissan Motor Co., Ltd.**	86,196,200	121,305,000	+ 41
9	Pepsico, Inc.	102,637,700	100,624,900	- 2
10	Honda Motor Co.**	62,189,400	85,802,100	+ 38
11	Anheuser-Busch Companies, Inc.	77,500,400	75,954,900	- 2
12	Mazda Motor Corp.**	56,765,600	73,272,800	+ 29
13	Coca Cola Co.*	55,605,100	68,080,500	+ 22
14	Hasbro, Inc.*	89,617,200	67,504,900	- 25
15	Hyundai Corp.**	60,971,800	59,875,300	- 2
16	Unilever N.V.*	55,746,000	47,698,400	- 14
17	Adolph Coors	46,270,400	45,599,200	- 1
18	American Express Co.	23,499,900	43,246,000	+ 84
19	Time Warner, Inc.*	46,931,600	40,901,600	- 13
20	American Home Products Corp.*	48,497,300	40,160,400	- 17
21	American Telephone & Telegraph	35,960,100	39,616,400	+ 10
22	Kellogg Co.	53,286,600	38,983,600	- 27
23	Bell Atlantic	32,040,600	38,372,500	+ 20
24	Nestle S.A.*	45,409,200	37,674,600	- 17
25	Mitsubishi Corp.**	38,044,800	36,380,000	- 4

* 1988 data adjusted to reflect mergers, acquisistions, divestitures in 1989
**Includes company and their dealer associations, all products and services

SOURCE: Television Bureau of Advertising from Broadcast Advertisers Reports data in the top 75 markets.

1988	ABC	CBS	NBC	TOTAL
January/March	$ 949,098,900	$ 703,644,600	$ 802,454,900	$2,455,198,400
April/June	699,060,500	737,524,400	843,490,100	2,280,075,000
July/September	566,948,500	533,476,300	1,098,318,000	2,198,742,800
October/December	809,199,100	760,989,900	1,075,943,200	2,646,132,200
YEAR	$3,024,307,000	$2,735,635,200	$3,820,425,200	9,580,367,400
1989				
January/March	$ 666,631,900	$ 732,367,200	867,801,200	$2,266,800,300
April/June	742,604,700	740,923,900	928,312,000	2,411,840,600
July/September	615,238,500	550,035,000	808,221,500	1,973,495,000
October/December	995,405,400	835,587,600	1,075,948,200	2,906,941,200
YEAR	$3,019,880,500	$2,858,913,700	$3,680,282,900	$9,559,077,100

By Daypart

October - December

	1988	1989	% Change
Early Morning Mon/Fri	$ 74,405,800	$ 82,180,300	+ 10.4
Daytime Mon/Fri	344,463,000	353,513,600	+ 2.6
Sat/Sun	468,031,900	485,799,900	+ 3.8
Early Fringe Mon/Fri	118,971,500	134,028,800	+ 12.7
Sat/Sun	20,853,300	23,283,900	+ 11.7
Nighttime Mon/Sun	1,485,633,600	1,707,922,300	+ 15.0
Late Night Mon/Sun	133,773,100	120,212,400	- 10.1
Total	$2,646,132,200	2,906,941,200	+ 9.9

January - December

Early Morning Mon/Fri	$ 330,257,300	$ 273,094,900	- 17.3
Daytime Mon/Fri	1,335,703,900	1,176,341,400	- 11.9
Sat/Sun	1,415,485,000	1,354,941,100	- 4.3
Early Fringe Mon/Fri	449,497,500	476,973,800	+ 6.1
Sat/Sun	172,960,200	95,308,100	- 44.9
Nightime Mon/Sun	5,277,808,200	5,669,808,000	+ 7.4
Late Night Mon/Sun	598,655,300	512,609,800	- 14.4
Total	9,580,367,400	9,559,077,100	- 0.2

SOURCE: Television Bureau of Advertising/Broadcast Advertisers Reports

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ESTIMATED INVESTMENTS BY NETWORK TELEVISION ADVERTISERS

BY PRODUCT CLASSIFICATION

	1988	1989	% Change
Apparel, Footwear & Accessories	$ 230,209,700	$ 268,714,900	+ 17
Automotive	1,307,004,600	1,490,623,200	+ 14
Beer & Wine	479,717,800	363,626,200	- 24
Building Material, Equipment & Fixtures	99,773,600	83,738,400	- 16
Computers, Office Equipment & Stationery	186,513,800	159,118,600	- 15
Confectionery & Soft Drinks	432,190,000	378,692,800	- 12
Consumer Services	472,722,600	436,717,400	- 8
Food & Food Products	1,639,480,200	1,685,382,300	+ 3
Gasoline, Lubricants & Other Fuels	54,945,300	38,232,200	- 30
Freight & Industrial Development	67,754,200	56,352,700	- 17
Home Electronics Equipment	68,412,800	56,078,400	- 18
Horticulture	38,907,900	38,483,400	- 1
Household Equipment & Supplies	260,030,900	252,283,700	- 3
Household Furnishings	79,223,700	70,662,000	- 11
Insurance	168,687,200	157,783,200	- 6
Jewelry, Optical Goods & Cameras	129,050,600	111,030,000	- 14
Pet Foods & Supplies	126,184,200	133,929,900	+ 6
Proprietary Medicines	794,100,300	766,899,300	- 3
Publishing & Media	43,289,600	61,201,900	+ 41
Religious, Political & Unions	46,155,900	10,586,800	- 77
Soaps, Cleansers & Polishes	320,551,800	318,717,400	- 1
Sporting Goods & Toys	116,662,200	125,961,200	+ 8
Toiletries & Toilet Goods	868,815,000	849,626,700	- 2
Travel, Hotels & Resorts Outside USA	169,277,100	169,325,700	- 0 -
Miscellaneous	187,712,100	142,780,200	- 24

SOURCE: Television Bureau of Advertising from Broadcast Advertisers Reports data.

NETWORK TELEVISION ADVERTISERS BY CLASSIFICATION

(CONTINUED)

Retail Categories	1988	1989	% Change
Amusements & Entertainment	$ 56,900	8,439,800	+ + -
Appliance Stores	12,899,600	12,565,300	- 3
Auto Repair & Service Stations	26,171,400	19,753,900	- 25
Auto Supply & Accessory Stores	25,179,500	10,755,100	- 57
Banks & Savings & Loans Associations	10,095,200	7,182,000	- 29
Dairy Stores	9,329,000	6,102,000	- 35
Department Stores	79,141,300	163,982,700	+ 107
Discount Department Stores	56,291,700	31,784,300	- 44
Financial Planning Services	63,745,400	62,542,500	- 2
Gas, Electric & Water Companies	9,656,600	3,921,700	- 59
Health Clubs & Reducing Salons	6,273,500	4,906,000	- 22
Home Centers & Hardware Stores	38,735,200	37,292,400	- 4
Hotels & Resorts, U.S.	42,823,300	31,487,600	- 26
Leisure Time Activities & Services	14,051,500	19,724,400	+ 40
Loan & Mortgage Companies	11,592,900	8,003,900	- 31
Movies	183,893,300	214,274,600	+ 17
Optical Service & Supplies	451,600	4,868,300	+ 978
Radio & Cable TV	783,600	10,970,900	+1,300
Realtors & Real Estate Developers	42,129,700	37,078,300	- 12
Restaurants & Drive-Ins	514,835,200	604,444,600	+ 17
Shoe Stores	14,120,600	7,081,700	- 50
Sport, Hobby & Toy Stores	3,022,300	6,293,000	+ 108
Miscellaneous	27,715,000	19,073,600	- 31
TOTAL	$9,580,367,400	$9,559,077,100	- 0 -

SOURCE: Television Bureau of Advertising from Broadcast Advertisers Reports data.

TOP 25 NETWORK TELEVISION ADVERTISERS - 1989

		1988	1989	% Change
1	General Motors Corp.	$ 443,402,300	$ 506,513,500	+ 14
2	Procter & Gamble Co.*	408,816,900	441,419,100	+ 8
3	Philip Morris Companies, Inc.	388,601,800	368,373,000	- 5
4	Kellogg Co.	297,739,800	324,822,800	+ 9
5	McDonalds Corp.	245,388,500	252,066,200	+ 3
6	Ford Motor Co.	175,687,800	201,371,700	+ 15
7	Kohlberg Kravis Roberts & Co.*	230,777,800	198,356,400	- 14
8	Unilever N.V.*	197,265,000	189,906,100	- 4
9	Sears Roebuck & Co.*	85,900,600	187,511,300	+ 118
10	Anheuser-Busch Companies, Inc.*	207,363,700	181,467,000	- 12
11	American Home Pdts. Corp.*	180,449,000	176,182,800	- 2
12	Johnson & Johnson*	175,669,700	169,945,300	- 3
13	Pepsico, Inc.	145,047,900	168,815,000	+ 16
14	American Telephone & Teleg Co.	173,912,300	162,749,500	- 6
15	Grand Metropolitan PLC.*	95,822,600	148,215,600	+ 55
16	General Mills, Inc.	137,450,100	144,974,500	+ 5
17	Chrysler Corp.*	163,229,600	140,580,800	- 14
18	Eastman Kodak Co.	144,751,100	137,517,300	- 5
19	Bristol-Myers Squibb Co.*	121,264,800	133,870,000	+ 10
20	Toyota Motor Sales Co, LTD.	64,193,100	110,846,900	+ 73
21	Quaker Oats Co.	123,327,100	104,414,800	- 15
22	Honda Motor Co., LTD.	91,884,400	101,012,500	+ 10
23	Warner-Lambert Co.	111,071,700	100,825,600	- 9
24	Coca Cola Co.*	119,090,700	98,905,500	- 17
25	Nestle S.A.*	72,700,100	89,891,800	+ 24

* 1988 data adjusted to reflect mergers, acquisitions, divestitures in 1989

SOURCE: Television Bureau of Advertising from Broadcast Advertisers Reports data.

- MORE -

ESTIMATED INVESTMENTS BY NATIONAL SYNDICATED TELEVISION ADVERTISES

BY PRODUCT CLASSIFICATION

	1988	1989	% CHANGE
Agriculture & Farming	$ 1,657,700	$ 1,285,200	- 22
Apparel, Footwear & Accessories	15,977,100	34,326,400	+ 115
Automotive	29,119,900	64,284,200	+ 121
Beer & Wine	27,071,200	34,675,100	+ 28
Building Material, Equipment & Fixtures	2,059,300	2,633,900	+ 28
Computers, Office Equipment & Stationery	2,215,500	4,791,500	+ 116
Confectionery & Soft Drinks	90,423,700	111,059,800	+ 23
Consumer Services	15,359,500	29,071,900	+ 89
Food & Food Products	240,121,800	325,307,600	+ 35
Gasoline, Lubricants & Other Fuels	343,700	621,500	+ 81
Home Electronics Equipment	17,267,300	32,389,800	+ 88
Horticulture	881,400	3,819,200	+ 333
Household Equipment & Supplies	26,162,600	42,396,700	+ 62
Household Furnishings	570,300	2,025,300	+ 255
Insurance	1,357,200	4,089,600	+ 201
Jewelry, Optical Goods & Cameras	11,213,300	11,202,300	- 0
Pet Foods & Supplies	23,909,000	28,402,900	+ 19
Proprietary Medicines	89,172,300	124,252,000	+ 39
Publishing & Media	7,830,400	19,412,100	+ 148
Religious, Political & Unions	2,386,300	2,817,800	+ 18
Soaps, Cleaners & Polishes	43,216,300	68,328,600	+ 58
Sporting Goods & Toys	57,149,600	71,956,800	+ 26
Toiletries & Toilet Goods	124,927,300	156,503,200	+ 25
Travel, Hotels & Resorts Outside USA	4,003,000	4,725,900	+ 18
Miscellaneous	6,083,700	2,744,200	- 55

SOURCE: Television Bureau of Advertising from Broadcast Advertisers Report data.

- MORE -

NATIONAL SYNDICATED TELEVISION ADVERTISERS BY CLASSIFICATION

Retail Categories	1988	1989	% Change
Appliance Stores	---	$ 1,273,700	+ inf.
Dairy Stores	$ 1,234,900	2,574,200	+ 108
Department Stores	4,778,200	5,137,000	+ 8
Discount Department Stores	4,123,800	1,526,900	- 63
Financial Planning Services	1,188,300	1,149,500	- 3
Home Center & Hardware Stores	386,300	1,969,600	+ 410
Leisure Time Activities & Services	1,843,200	1,871,500	+ 2
Movies	13,097,000	32,855,700	+ 151
Personal Services, Misc.	1,822,400	7,801,200	+ 328
Radio & Cable TV	864,000	1,302,500	+ 51
Restaurants & Drive-Ins	25,028,100	43,069,300	+ 72
Miscellaneous	5,485,800	3,171,500	- 42
Total	$900,331,400	$1,286,826,100	+ 43

SOURCE: Television Bureau of Advertising from Broadcast Advertisers Reports data.

TOP 25 NATIONAL SYNDICATED TELEVISION ADVERTISERS - 1989

		1988	1989	% Change
1	Philip Morris Companies, Inc.	$ 88,589,300	$ 106,798,200	+ 21
2	Procter & Gamble Co.*	63,040,600	87,874,400	+ 39
3	Kellogg Co.	23,376,400	50,676,300	+ 117
4	Unilever N.V.	27,244,100	38,887,200	+ 43
5	Bristol-Myers Squibb Co.	32,646,200	34,368,200	+ 5
6	Nestle S.A	26,258,900	31,099,400	+ 18
7	H.J. Heinz Co.	18,785,300	27,150,700	+ 45
8	Grand Metropolitan PLC*	20,131,800	25,350,700	+ 26
9	Warner-Lambert Co.	19,562,900	24,741,700	+ 26
10	Kohlberg Kravis Roberts & Co.*	23,212,700	23,293,700	- 0 -
11	Mars Inc.	23,778,900	22,282,000	- 6 -
12	Tonka Corp.	10,099,700	21,341,400	+ 111
13	General Motors Corp.	6,053,900	20,671,400	+ 241
14	Smithkline Beecham	17,816,800	19,991,400	+ 12
15	Johnson & Johnson	13,300,600	19,148,700	+ 44
16	Coca Cola Co.*	19,063,100	18,387,800	- 4
17	Quaker Oats Co.	18,412,900	17,533,300	- 5
18	McDonalds Corp.	12,516,200	17,409,300	+ 39
19	Hasbro, Inc.*	21,206,800	17,158,100	- 19
20	United Biscuits Holdings Pl.	6,928,800	17,119,700	+ 147
21	Hershey Foods Corp.	13,179,200	13,936,600	+ 6
22	Eastman Kodak Co.	16,945,100	13,698,600	- 19
23	Ralston Purina Co.*	10,482,600	13,422,700	+ 28
24	Time Warner, Inc.*	4,267,100	13,178,200	+ 209
25	S.C. Johnson & Sons, Inc.	3,559,700	12,597,200	+ 254

* 1988 data adjusted to reflect mergers, acquisitions, divestitures in 198

SOURCE: Television Bureau of Advertising from Broadcast Advertisers Report data.

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A9055-134

TVB NEWS

Television Bureau of Advertising, Inc., 477 Madison Avenue, New York, New York 10022 (212) 486-1111

FOR IMMEDIATE RELEASE
March 5, 1991

TELEVISION REVENUES UP 6.0% FROM 1989 TO 1990 DESPITE ECONOMIC DOWNTURN OF 4TH QUARTER

Television revenues were up 6.0% in 1990 for a record total of $22.6 billion vs. $21.3 billion in 1989, it was announced today by Jim Joyella, president, Television Bureau of Advertising.

Figures from Arbitron report that:

*Local television increased 2.4% from 1989 with Pepsico charting an 11% gain and Disney, 29% over last year.

*Spot was up 5.1%. Procter and Gamble increased TV spending by 38% and Philip Morris by 22%.

*Network television increased 6.0%, without the benefit of national political and Olympic dollars. General Motors spent 18%, and P & G spent 24% more respectively.

*National Syndication increased 23.4%, although it should be noted that the Fox Network is included in this total.

"Local sales were positively affected by the infusion of some $300 million in political advertising, which buoyed many markets. Offsetting some of this strength was a drop in three main areas - retail, banking and auto," said Mr. Joyella. "It is interesting to note that the companies that rely the most on television, increased well above the average. While television spending in the first quarter of '91 has been affected by the Gulf War, the successful outcome of that conflict can only serve to improve consumer confidence and stimulate new demand."

The Television Bureau of Advertising represents the broadcast television industry to the advertising community. Its goals are to further regional and national advertiser relationships, as well as to provide members and clients with its television marketing resources, which are the largest in the world.

(more)

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Contact: Ronni M. Faust
(212) 486-1111

TV ADVERTISING INVESTMENTS
4th Quarter 1990 VS 1989

	Oct - Dec 1989	Oct - Dec 1990	%CHANGE
NETWORK	$ 2,906,941,200	$ 2,843,545,100	- 2.2
SPOT	1,596,449,000	1,606,325,900	+ 0.6
LOCAL	1,406,908,200	1,439,735,900	+ 2.3
NATIONAL SYNDICATION	389,074,700	458,075,900	+17.7
TOTAL	$ 6,299,373,100	$ 6,347,682,800	+ 0.8

	Jan - Dec 1989	Jan - Dec 1990	%CHANGE
NETWORK	$ 9,559,077,100	$ 10,132,344,200	+ 6.0
SPOT	5,423,256,600	5,697,143,400	+ 5.1
LOCAL	5,076,006,100	5,200,181,600	+ 2.4
NATIONAL SYNDICATION	1,286,826,100	1,587,656,500	+23.4
TOTAL	$ 21,345,165,900	$ 22,617,325,700	+ 6.0

SOURCE: Arbitron

(more)

LOCAL/RETAIL* TELEVISION ADVERTISING EXPENDITURES BY PRODUCT CLASSIFICATION

	1989	1990	%CHANGE
AUTOMOTIVE	$ 466,923,200	$ 414,248,000	-11
Auto Repair & Service Stations	88,743,300	93,933,700	
Auto Supply & Accessory Stores	39,734,700	33,992,900	
Auto & Truck Dealers	321,401,900	270,630,200	
Camper & Recreational Vehicle Dealers	7,947,300	7,535,100	
Mobile Home Dealers & Sites	4,443,900	3,468,200	
Motorcycle Dealers	1,373,200	971,900	
Automotive Misc.	3,278,900	3,716,000	
APPAREL STORES	198,708,500	174,226,600	-12
Clothing Stores	143,583,600	128,757,400	
Fur Salons	8,344,700	6,688,700	
Shoe Stores	44,006,600	36,116,400	
Apparel Stores Misc.	2,773,600	2,664,100	
BUSINESS & FINANCIAL SERVICES	298,996,100	296,759,000	- 1
Banks, Savings & Loan Associations	197,298,900	178,765,400	
Computer Sales & Repair Services	3,799,800	3,245,800	
Employment Agencies	2,984,800	2,611,600	
Insurance Agencies	16,951,000	18,800,200	
Financial Planning Services	24,355,500	26,862,500	
Loan & Mortgage Companies	30,411,000	39,187,100	
Office Equipment & Supply Stores	6,143,000	6,949,900	
Business & Financial Misc.	17,052,100	20,336,500	
DEPARTMENT, DISCOUNT & VARIETY STORES	372,976,400	333,641,300	-11
Department Stores	213,098,900	169,007,100	
Discount Department Stores	117,115,800	121,367,500	
Mail Order & Catalogue Showrooms	11,123,000	10,192,500	
Shopping Centers & Associations	26,009,700	28,326,600	
Variety Stores	5,629,000	4,747,600	
DRUG & FOOD STORES	468,021,900	476,274,200	+ 2
Bake Shops	10,917,400	11,608,300	
Beverage Distributors	2,908,400	1,196,100	
Dairy Stores	11,721,600	11,699,300	
Drug Stores	93,916,500	100,969,200	
Food Stores & Supermarkets	341,197,300	343,988,000	
Meat, Fish & Poultry Stores	2,846,000	3,412,900	
Food Dealers Misc.	4,514,700	3,400,400	
HOUSEHOLD SERVICES	101,253,800	99,472,500	- 2
Builders & Home Improvement Contractors	27,172,100	26,451,400	
Exterminators	9,096,200	9,940,800	
Moving & Storage Companies	2,508,800	4,639,500	
Nurseries, Lawn Care Supplies & Services	7,706,900	6,618,600	
Plumbing, Heating & Air Conditioner Contractors	7,088,400	6,300,700	
Pool Contractors, Supplies & Services	7,842,400	7,370,800	
Realtors & Real Estate Developers	33,643,100	27,513,500	
Upholsterers	674,100	566,100	
Household Services Misc.	5,521,800	10,071,100	

* As defined by Arbitron

(more)

LOCAL/RETAIL TELEVISION ADVERTISING EXPENDITURES BY PRODUCT CLASSIFICATION
(CONTINUED)

	1989	1990	%CHANGE
HOUSEHOLD STORES	$ 614,158,100	$ 633,650,800	+ 3
Appliance Stores & Repair	152,788,800	178,039,900	
Carpet & Floor Covering Stores	51,038,800	47,432,600	
Drapery & Interior Decorating Services	1,353,400	1,666,900	
Fabric & Sewing Machine Stores	1,816,800	2,395,800	
Furniture Stores	278,184,800	272,851,600	
Home Centers & Hardware Stores	106,275,200	108,413,000	
Lighting & Light Fixture Stores	5,619,800	4,158,900	
Household Stores Misc.	17,080,500	18,692,100	
LEISURE TIME STORES & SERVICES	1,469,706,500	1,497,828,500	+ 2
Amusements & Entertainment	143,942,100	145,943,700	
Hotels & Resorts U.S.	82,412,800	76,185,000	
Marine Suppliers & Services	4,058,700	2,273,000	
Movies	210,823,900	237,788,000	
Restaurants & Drive-Ins	838,256,800	828,094,600	
Sport, Hobby & Toy Stores	47,397,200	49,926,100	
Travel & Tour Agencies	8,315,400	6,180,500	
Leisure Time Activities & Services Misc.	134,499,600	151,437,600	
LOCAL MEDIA	223,262,000	202,060,900	- 9
Magazines & Other Local Publications	1,752,500	1,485,700	
Newspapers	37,154,900	29,221,700	
Radio Stations & Cable TV	182,803,700	168,243,400	
Local Media & Advertising Services Misc.	1,550,900	3,110,100	
MEDICAL & HEALTH RELATED SERVICES	319,749,700	352,854,800	+10
Convalescent & Retirement Homes	490,100	551,400	
Health Clubs & Reducing Salons	93,648,100	115,729,500	
Hearing Aid Centers	1,996,000	1,141,500	
Medical & Dental Services	144,771,500	150,072,100	
Optical Services & Supplies	77,392,700	84,085,300	
Medical & Health Supply Dealers Misc.	1,451,300	1,275,000	
PERSONAL SERVICES	170,591,000	214,726,100	+26
Beauty Shops & Supplies	25,682,400	25,543,800	
Data Match Services	5,195,300	4,997,500	
Legal Services	82,291,800	94,772,300	
Photographers & Photo Studios	400,900	484,200	
Personal Services Misc.	57,020,600	88,928,300	
PUBLIC UTILITIES & FUEL DEALERS	56,342,800	55,024,600	- 2
Fuel Supply Dealers	1,578,200	1,363,700	
Gas, Electric & Water Companies	50,429,500	46,433,800	
Transit & Transportation	4,335,100	7,227,100	

(more)

LOCAL/RETAIL TELEVISION ADVERTISING EXPENDITURES BY CLASSIFICATION
(CONTINUED)

	1989	1990	%CHANGE
RETAIL & LOCAL STORES, OTHER	$ 78,263,200	$ 81,214,400	+ 4
Agriculture Stores & Services	4,844,200	8,155,800	
Florists	2,122,500	1,736,400	
Gift & Book Stores	9,515,400	7,622,000	
Jewelry Stores	25,745,300	22,896,500	
Luggage & Leather Shops	543,300	451,000	
Music Stores	8,675,700	11,091,800	
Pets & Pet Supply Stores	2,683,100	4,290,700	
Retail & Local Stores Misc.	24,133,700	24,970,200	
RETAIL SERVICES MISCELLANEOUS	172,988,300	152,417,400	-12
Auctioneers & Auction Houses	620,100	566,100	
Aviation Sales & Services	279,000	421,200	
Dry Cleaners & Laundries	1,520,600	1,457,800	
Funeral Homes & Services	4,990,500	4,937,100	
Local Education Services	131,862,200	111,760,500	
Rental Services - Auto & Truck	2,671,300	2,891,400	
Rental Services - Other	31,044,600	30,383,300	
MISCELLANEOUS	64,064,600	215,782,500	+237
Industrial Manufacturing	2,788,100	2,381,000	
Political Advertisements	49,488,900	203,189,000	
Miscellaneous	11,787,600	10,212,500	
TOTAL	$5,076,006,100	$5,200,181,600	

NOTE: Most co-op activity is credited by Arbitron to the manufacturers and is not included in the above local data.

SOURCE: Television Bureau of Advertising from Arbitron data in the top 75 markets.

(more)

TOP 25 LOCAL/RETAIL TELEVISION ADVERTISERS** - 1990

	1989	1990	%CHANGE
1. Pepsico, Inc. (Pizza Hut, Taco Bell, Kentucky Fried Chicken)	$ 164,058,600	$ 181,330,200	+11
2. McDonalds Corp.	142,686,400	146,947,700	+ 3
3. Walt Disney Co.	63,525,400	82,031,200	+29
4. Circuit City Stores, Inc.	41,072,000	50,293,200	+22
5. Imasco Ltd. (Hardees, Roy Rogers, etc.)*	55,104,700	49,823,800	-10
6. Dayton-Hudson Corp.*	44,944,200	49,391,700	+10
7. American Stores Co.	46,313,500	47,869,500	+ 3
8. Grand Metropolitan PLC (Burger King, Pearle Vision, etc.)	62,961,400	45,267,100	-28
9. Kohlberg Kravis Roberts & Co. (Safeway, Fred Meyer, Seaman's, etc.)	46,741,900	41,858,600	-10
10. Walton Enterprises, Inc. (Wal-Mart)	34,707,800	39,414,000	+14
11. Time Warner Inc. (Movies & Cable TV)*	46,000,200	38,973,600	-15
12. Foodmaker, Inc. (Jack-In-The-Box, Chi-Chi's)	35,332,400	37,264,000	+ 5
13. Wendy's International, Inc.	36,509,000	37,068,800	+ 2
14. Sony Corp. (Movies)	30,404,100	31,914,500	+ 5
15. Whitman Corp. (Midas Muffler)	30,035,300	31,665,400	+ 5
16. The Kroger Co.	34,506,400	30,494,000	-12
17. Nutri-System Inc.	21,972,200	30,109,800	+37
18. MCA Inc. (Movies)	24,670,000	27,988,900	+13
19. U.S. Shoe Corp. (Lens Crafter)	27,081,500	27,331,000	+ 1
20. Chesapeake Financial Corp. (Arby's)	23,692,200	26,328,200	+11
21. Sears Roebuck & Co.	46,502,300	26,299,400	-43
22. News Corp. Ltd. (Movies)*	20,516,200	25,199,100	+23
23. Merrill Lynch & Co. (Eckerd Drugs)	21,991,400	25,011,900	+14
24. K mart Corp.	23,332,700	24,266,600	+ 4
25. Winn-Dixie Food Stores Inc.	21,888,300	23,696,300	+ 8

*1989 data adjusted to reflect mergers, acquisitions, divestitures in 1990.
** As defined by Arbitron.
SOURCE: The Television Bureau of Advertising from Arbitron data in top 75 markets

(more)

NATIONAL AND REGIONAL SPOT TELEVISION ADVERTISING*

By Daypart

	Oct-Dec 1989	Oct-Dec 1990	%CHANGE	%SHARE
Daytime	$342,036,100	$334,479,100	-2.2	20.8
Early Evening	507,376,900	513,025,500	+1.1	32.0
Nighttime	441,517,500	466,494,900	+5.7	29.0
Late Night	305,518,500	292,326,400	-4.3	18.2
TOTAL	$1,596,449,000	$1,606,325,900	+0.6	100.0

	Jan-Dec 1989	Jan-Dec 1990	%CHANGE	%SHARE
Daytime	$1,082,136,500	$1,124,816,300	+3.9	19.7
Early Evening	1,740,774,600	1,851,903,700	+6.4	32.5
Nighttime	1,538,913,400	1,652,221,700	+7.4	29.0
Late Night	1,061,432,100	1,068,201,700	+0.6	18.8
TOTAL	$5,423,256,600	$5,697,143,400	+5.1	100.0

* Top 75 markets only.

SOURCE: Television Bureau of Advertising from Arbitron data.

(more)

ESTIMATED INVESTMENTS BY NATIONAL AND REGIONAL SPOT TELEVISION ADVERTISERS
BY PRODUCT CLASSIFICATION

	1989	1990	%CHANGE
Agriculture & Farming	$ 17,357,700	$ 12,250,800	-29
Apparel, Footwear & Accessories	93,616,900	104,968,400	+12
Automotive	1,414,833,700	1,449,164,300	+ 2
Beer & Wine	208,122,300	201,189,000	- 3
Building Materials, Equipment & Fixtures	79,352,000	57,628,800	-27
Computers, Office Equipment & Stationery	31,794,600	21,164,700	-33
Confectionery & Soft Drinks	302,674,800	337,842,800	+12
Consumer Services	380,267,800	413,930,400	+ 9
Food & Food Products	958,455,800	1,069,169,400	+12
Freight & Industrial Development	35,811,100	33,398,300	- 7
Gasoline, Lubricants & Other Fuels	163,955,500	168,993,200	+ 3
Home Electronics Equipment	116,469,200	130,723,100	+12
Horticulture	47,282,200	41,381,300	-12
Household Equipment & Supplies	132,078,400	145,609,300	+10
Household Furnishings	42,591,000	29,267,600	-31
Insurance	103,882,000	120,280,200	+16
Jewelry, Optical Goods & Cameras	58,832,700	47,785,100	-19
Pet Foods & Supplies	41,044,300	35,540,100	-13
Proprietary Medicines	166,599,200	201,155,800	+21
Publishing & Media	130,351,500	123,783,600	- 5
Religious, Political & Unions	17,717,800	19,943,700	+13
Smoking Materials	4,882,800	4,401,400	-10
Soaps, Cleansers & Polishes	118,370,800	156,250,900	+32
Sporting Goods & Toys	192,727,600	191,666,600	- 1
Toiletries & Toilet Goods	281,113,100	258,362,200	- 8
Travel, Hotels & Resorts Outside U.S.	214,671,200	276,477,700	+29
Miscellaneous	68,400,600	44,814,700	-34
TOTAL	$5,423,256,600	$5,697,143,400	+ 5

SOURCE: Television Bureau of Advertising from Arbitron data.

(more)

TOP 25 NATIONAL AND REGIONAL SPOT TELEVISION ADVERTISERS - 1990

	1989	1990	%CHANGE
1. General Motors Corp. **	$ 350,297,700	$ 381,929,500	+ 9
2. The Procter & Gamble Co. *	219,069,500	303,149,000	+38
3. Philip Morris Companies, Inc. *	179,885,600	219,449,000	+22
4. Toyota Motor Sales Co., Ltd. **	164,199,800	216,776,800	+32
5. Ford Motor Co. **/*	182,166,200	201,493,500	+11
6. General Mills, Inc.	135,541,400	171,966,200	+27
7. Chrysler Corp. **/*	166,106,100	137,633,300	-17
8. Nissan Motor Co., Ltd. **	121,305,000	124,871,600	+ 3
9. Pepsico, Inc.	100,624,900	103,291,600	+ 3
10. Mazda Motor Corp. **	73,272,800	91,049,400	+24
11. Honda Motor Co. **	85,802,100	87,257,400	+ 2
12. Coca Cola Co.	68,080,500	75,022,000	+10
13. Anheuser-Busch Companies, Inc.	75,954,900	71,066,700	- 6
14. American Telephone & Telegraph	39,616,400	68,709,700	+73
15. Unilever N.V. *	59,853,700	64,442,100	+ 8
16. Hyundai Corp. **	59,875,300	59,209,300	- 1
17. Hasbro, Inc.*	71,852,100	55,860,900	-22
18. Adolph Coors	45,599,200	50,178,600	+10
19. American Home Products Corp. *	37,157,600	46,850,200	+26
20. Kellogg Co.	38,983,600	44,607,000	+14
21. Bell Atlantic	38,372,500	41,200,400	+ 7
22. Time Warner, Inc.	40,901,600	40,035,100	- 2
23. Mars, Inc.	33,551,300	39,001,200	+16
24. Nestle S.A. *	40,600,900	36,018,500	-11
25. Warner-Lambert Co.	23,687,400	35,889,800	+52

* 1989 data adjusted to reflect mergers, acquisitions, divestitures in 1990.
** Includes company and their dealer associations, all products and services.

Source: Television Bureau of Advertising from Arbitron data in the top 75 markets.

(more)

NETWORK TELEVISION ADVERTISING

1989	ABC	CBS	NBC	TOTAL
Jan/Mar	$ 666,631,900	$ 732,367,200	$ 867,801,200	$ 2,266,800,300
Apr/June	742,604,700	740,923,900	928,312,000	2,411,840,600
July/Sept	615,238,500	550,035,000	808,221,500	1,973,495,000
Oct/Dec	995,405,400	835,587,600	1,075,948,200	2,906,941,200
YEAR	$3,019,880,500	$2,858,913,700	$3,680,282,900	$9,559,077,100
1990				
Jan/Mar	$ 760,734,900	$ 890,882,100	$ 923,294,900	$ 2,574,911,900
Apr/June	821,783,000	788,960,700	991,627,900	2,602,371,600
July/Sept	676,410,500	591,661,600	843,443,500	2,111,515,600
Oct/Dec	975,084,100	905,742,900	962,718,100	2,843,545,100
YEAR	$3,234,012,500	$3,177,247,300	$3,721,084,400	$10,132,344,200

By Daypart

Oct - Dec

	1989	1990	%CHANGE
Early Morning Mon/Fri	$ 82,180,300	$ 86,696,900	+ 5.5
Daytime Mon/Fri	353,513,600	357,214,300	+ 1.0
Sat/Sun	485,799,900	471,536,900	- 2.9
Early Fringe Mon/Fri	134,028,800	131,669,300	- 1.8
Sat/Sun	23,283,900	22,467,800	- 3.5
Nighttime Mon/Sun	1,707,922,300	1,646,264,200	- 3.6
Late Night Mon/Sun	120,212,400	127,695,700	+ 6.2
TOTAL	$ 2,906,941,200	$ 2,843,545,100	- 2.2

Jan - Dec

	1989	1990	%CHANGE
Early Morning Mon/Fri	$ 273,094,900	$ 297,371,500	+ 8.9
Daytime Mon/Fri	1,176,341,400	1,217,746,800	+ 3.5
Sat/Sun	1,354,941,100	1,457,033,600	+ 7.5
Early Fringe Mon/Fri	476,973,800	505,771,200	+ 6.0
Sat/Sun	95,308,100	103,524,600	+ 8.6
Nighttime Mon/Sun	5,669,808,000	6,053,046,900	+ 6.8
Late Night Mon/Sun	512,609,800	497,849,600	- 2.9
TOTAL	$9,559,077,100	$10,132,344,200	+ 6.0

SOURCE: Television Bureau of Advertising from Arbitron data.

(more)

ESTIMATED INVESTMENTS BY NETWORK TELEVISION ADVERTISERS
BY PRODUCT CLASSIFICATION

	1989	1990	%CHANGE
Apparel, Footwear & Accessories	$ 268,714,900	$ 276,785,900	+ 3
Automotive	1,490,623,200	1,781,283,800	+19
Beer & Wine	363,626,200	293,456,300	-19
Building Materials, Equipment & Fixtures	83,738,400	72,344,800	-14
Computers, Office Equipment & Stationery	159,118,600	149,238,100	- 6
Confectionery & Soft Drinks	378,692,800	407,090,100	+ 7
Consumer Services	436,717,400	524,941,500	+20
Food & Food Products	1,685,382,300	1,704,039,900	+ 1
Freight & Industrial Development	56,352,700	55,294,500	- 2
Gasoline, Lubricants & Other Fuels	38,232,200	38,911,500	+ 2
Home Electronics Equipment	56,078,400	84,986,400	+52
Horticulture	38,483,400	36,110,000	- 6
Household Equipment & Supplies	252,283,700	244,727,500	- 3
Household Furnishings	70,662,000	52,599,800	-26
Insurance	157,783,200	172,412,100	+ 9
Jewelry, Optical Goods & Cameras	111,030,000	127,368,600	+15
Pet Foods & Supplies	133,929,900	104,095,300	-22
Proprietary Medicines	766,899,300	816,829,200	+ 7
Publishing & Media	61,201,900	28,471,300	-53
Religious, Political & Unions	10,586,800	9,015,700	-15
Soaps, Cleansers & Polishes	318,717,400	317,041,800	- 1
Sporting Goods & Toys	125,961,200	137,568,700	+ 9
Toiletries & Toilet Goods	849,626,700	943,603,000	+11
Travel, Hotels & Resorts Outside U.S.	169,325,700	146,242,100	-14
Miscellaneous	142,780,200	151,342,400	+ 6

SOURCE: Television Bureau of Advertising from Arbitron data.

(more)

NETWORK TELEVISION ADVERTISERS BY CLASSIFICATION
(CONTINUED)

Retail Categories	1989	1990	%CHANGE
Amusements & Entertainment	$ 8,439,800	$ 2,160,900	- 74
Appliance Stores	12,565,300	16,849,500	+ 34
Auto Repair & Service Stations	19,753,900	19,162,000	- 3
Auto Supply & Accessory Stores	10,755,100	2,340,700	- 78
Banks, Savings & Loan Associations	7,182,000	9,723,000	+ 35
Dairy Stores	6,102,000	5,856,300	- 4
Department Stores	163,982,700	203,236,100	+ 24
Discount Department Stores	31,784,300	44,981,000	+ 42
Financial Planning Services	62,542,500	50,760,000	- 19
Gas, Electric & Water Companies	3,921,700	2,318,200	- 41
Health Clubs & Reducing Salons	4,906,000	7,384,500	+ 51
Home Centers & Hardware Stores	37,292,400	41,046,300	+ 10
Hotels & Resorts, U.S.	31,487,600	35,235,400	+ 12
Leisure Time Activities & Services	19,724,400	21,744,600	+ 10
Loan & Mortgage Companies	8,003,900	9,824,900	+ 23
Movies	214,274,600	241,547,300	+ 13
Optical Services & Supplies	4,868,300	6,577,100	+ 35
Radio Stations & Cable TV	10,970,900	27,376,800	+150
Realtors & Real Estate Developers	37,078,300	32,403,600	- 13
Restaurants & Drive-Ins	604,444,600	624,297,000	+ 3
Shoe Stores	7,081,700	14,643,700	+107
Sport, Hobby & Toy Stores	6,293,000	7,429,700	+ 18
Miscellaneous	19,073,600	29,645,300	+ 55
TOTAL	$9,559,077,100	$10,132,344,200	+ 6

SOURCE: Television Bureau of Advertising from Arbitron data.

(more)

TOP 25 NETWORK TELEVISION ADVERTISERS - 1990

	1989	1990	%CHANGE
1. General Motors Corp.	$ 506,513,500	$ 598,370,300	+18
2. The Procter & Gamble Co. *	448,327,400	557,605,700	+24
3. Philip Morris Companies, Inc.	368,373,000	402,238,100	+ 9
4. Kellogg Co.	324,822,800	301,295,500	- 7
5. American Telephone & Telegraph	162,749,500	244,910,200	+50
6. Sears Roebuck & Co.	187,511,300	244,631,500	+30
7. McDonalds Corp.	252,066,200	230,993,600	- 8
8. Johnson & Johnson	169,945,300	211,440,900	+24
9. Ford Motor Co.	201,371,700	196,897,600	- 2
10. Pepsico, Inc.	168,815,000	193,446,900	+15
11. Chrysler Corp.	140,580,800	190,013,500	+35
12. Grand Metropolitan PLC	148,215,600	183,068,700	+24
13. Toyota Motor Sales Co., Ltd.	110,846,900	170,902,900	+54
14. Kohlberg Kravis Roberts & Co.*	166,556,700	168,340,900	+ 1
15. Unilever N.V. *	190,022,800	162,861,800	-14
16. American Home Pdcts. Corp.*	156,302,400	150,544,400	- 4
17. General Mills, Inc.	144,974,500	142,851,400	- 1
18. Bristol-Myers Squibb Co.	133,870,000	130,196,000	- 3
19. Anheuser-Busch Companies Inc.	181,467,000	129,009,300	-29
20. Nissan Motor Co., Ltd.	73,425,000	125,792,400	+71
21. Honda Motor Co., Ltd.	101,012,500	118,989,400	+18
22. Eastman Kodak Co.	137,517,300	116,522,600	-15
23. Nestle S.A. *	89,984,900	98,010,900	+ 9
24. Warner-Lambert Co.	100,825,600	91,115,400	-10
25. Coca Cola Co.	98,905,500	88,906,200	-10

* 1989 data adjusted to reflect mergers, acquisitions, divestitures in 1990.
Source: Television Bureau of Advertising from Arbitron data.

(more)

ESTIMATED INVESTMENTS BY NATIONAL SYNDICATED TELEVISION ADVERTISERS
BY PRODUCT CLASSIFICATION

	1989	1990	%CHANGE
Agriculture & Farming	$ 1,285,200	$ 887,300	- 31
Apparel, Footwear & Accessories	34,326,400	62,554,500	+ 82
Automotive	64,284,200	115,452,900	+ 80
Beer & Wine	34,675,100	44,962,300	+ 30
Building Materials, Equipment & Fixtures	2,633,900	1,417,700	- 46
Computers, Office Equipment & Stationary	4,791,500	7,191,200	+ 50
Confectionery & Soft Drinks	111,059,800	154,982,600	+ 40
Consumer Services	29,071,900	41,219,600	+ 42
Food & Food Products	325,307,600	365,121,100	+ 12
Gasoline, Lubricants & Other Fuels	621,500	1,691,900	+172
Home Electronics Equipment	32,389,800	42,805,100	+ 32
Horticulture	3,819,200	1,859,900	- 51
Household Equipment & Supplies	42,396,700	39,152,600	- 8
Household Furnishings	2,025,300	2,851,900	+ 41
Insurance	4,089,600	7,230,100	+ 77
Jewelry, Optical Goods & Cameras	11,202,300	15,475,500	+ 38
Pet Foods & Supplies	28,402,900	15,404,500	- 46
Proprietary Medicines	124,252,000	143,001,100	+ 15
Publishing & Media	19,412,100	22,720,600	+ 17
Religious, Political & Unions	2,817,800	1,477,000	- 48
Soaps, Cleansers & Polishes	68,328,600	68,711,000	+ 1
Sporting Goods & Toys	71,956,800	61,122,600	- 15
Toiletries & Toilet Goods	156,503,200	171,322,300	+ 9
Travel, Hotels & Resorts Outside U.S.	4,725,900	6,693,300	+ 42
Miscellaneous	2,744,200	3,622,400	+ 32

SOURCE: Television Bureau of Advertising from Arbitron data.

(more)

NATIONAL SYNDICATED TELEVISION ADVERTISERS BY CLASSIFICATION
(CONTINUED)

Retail Categories	1989	1990	%CHANGE
Appliance Stores	$ 1,273,700	$ 1,984,300	+ 56
Dairy Stores	2,574,200	665,400	- 74
Department Stores	5,137,000	13,418,000	+161
Discount Department Stores	1,526,900	2,503,700	+ 64
Financial Planning Services	1,149,500	703,400	- 39
Home Centers & Hardware Stores	1,969,600	1,438,100	- 27
Leisure Time Activities & Services	1,871,500	2,662,100	+ 42
Movies	32,855,700	56,956,300	+ 73
Personal Services, Misc.	7,801,200	6,568,800	- 16
Radio Stations & Cable TV	1,302,500	5,430,700	+317
Restaurants & Drive-Ins	43,069,300	88,557,500	+106
Miscellaneous	3,171,500	7,837,200	+147
TOTAL	$1,286,826,100	$1,587,656,500	+ 23

SOURCE: Television Bureau of Advertising from Arbitron data.

(more)

TOP 25 NATIONAL SYNDICATED TELEVISION ADVERTISERS - 1990

	1989	1990	%CHANGE
1. Philip Morris Companies, Inc.	$ 106,798,200	$ 133,752,000	+ 25
2. The Procter & Gamble Co. *	90,412,000	118,673,000	+ 31
3. Warner-Lambert Co.	24,741,700	48,430,100	+ 96
4. Grand Metropolitan PLC	25,350,700	45,821,400	+ 81
5. Kellogg Co.	50,676,300	45,353,300	- 11
6. Unilever N.V. *	38,939,700	42,151,900	+ 8
7. Coca Cola Co.	18,387,800	34,082,800	+ 85
8. Johnson & Johnson	19,148,700	33,392,800	+ 74
9. Bristol-Myers Squibb Co.	34,368,200	32,757,100	- 5
10. Nestle S.A. *	31,274,500	31,253,300	-0-
11. Kohlberg Kravis Roberts & Co.*	16,369,300	29,760,900	+ 82
12. McDonalds Corp.	17,409,300	28,009,400	+ 61
13. General Motors Corp.	20,671,400	27,601,400	+ 34
14. Time Warner, Inc.	13,178,200	27,500,000	+109
15. William Wrigley Jr. Co.	12,202,700	23,294,900	+ 91
16. Mars Inc.	22,282,000	23,004,600	+ 3
17. Eastman Kodak Co.	13,698,600	21,650,000	+ 58
18. American Telephone & Telegraph	7,043,800	19,989,000	+184
19. Pepsico, Inc.	10,061,500	18,000,400	+ 79
20. Nissan Motor Co., Ltd.	4,936,200	17,236,600	+249
21. Tonka Corp.	21,341,400	16,859,200	- 21
22. H.J. Heinz Co.	27,150,700	16,529,600	- 39
23. Toyota Motor Sales Co., Ltd.	8,616,300	16,258,400	+ 89
24. Nintendo Co., Ltd.*	8,002,200	16,051,900	+101
25. General Mills, Inc.	10,905,600	15,134,900	+ 39

* 1989 data adjusted to reflect mergers, acquisitions, divestitures in 1990.

Source: Television Bureau of Advertising from Arbitron data in the top 75 markets.

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